



National  
Co-ordinating  
Centre for  
Public Engagement

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# Introducing the EDGE tool

Self-assessing your support for public engagement

# The EDGE tool

The Beacons for Public Engagement initiative was funded to address how universities and research institutes can support public engagement effectively across all subject areas and throughout the full range of their activity.

The goal was to demonstrate how universities can ‘embed’ this support in their systems and processes, and by doing so create a culture that encourages staff and students to engage with the public.

By reflecting on the work of the six beacon projects, and drawing on the experiences of other institutions, projects and research, we have identified nine dimensions which are critical to building such a supportive culture: ranging from communication and leadership to learning and recognition.

To help universities assess their current support for public engagement, and to identify areas where they would like to see change, we have created a simple self-assessment tool that maps these dimensions against a scale:

E	Embryonic: Institutional support for engagement is patchy or non-existent, although some engagement activity is underway
D	Developing: Some support has been put in place, but in a relatively unsystematic and non-strategic fashion
G	Gripping: The institution is taking steps to develop more systematic and strategic support
E	Embedding: The institution has put in place strategic and operational support for engagement

## Introducing the EDGE tool

The tool is designed to support discussion and dialogue within your institution and to help you begin to frame a strategy for supporting public engagement. It is primarily intended as a trigger for discussion and reflection. We have divided the nine dimensions into three categories, each describing a critical area to think about: Purpose, Processes and People. You can find more details of our sources in the appendix.

<b>PURPOSE</b>	<b>EMBED A COMMITMENT TO PUBLIC ENGAGEMENT IN YOUR INSTITUTIONAL MISSION AND STRATEGY, AND CHAMPION THAT COMMITMENT AT ALL LEVELS</b>
Mission	Create a shared understanding of the purpose, value, meaning and role of public engagement to staff and students and embed this in your strategy and mission.

Leadership	Support champions across the organisation who embrace public engagement.
Communication	Communicate consistent, clear messages to validate, support and celebrate it, and ensure open and two-way communication with members of the public and community organisations.
<b>PROCESS</b>	<b>INVEST IN SYSTEMS AND PROCESSES THAT FACILITATE INVOLVEMENT, MAXIMISE IMPACT AND HELP TO ENSURE QUALITY AND VALUE FOR MONEY</b>
Recognition	Recognise and reward staff involvement within recruitment, promotion, workload plans and performance reviews, and celebrate success with awards or prizes.
Support	Co-ordinate the delivery of engagement to maximise efficiency, target support, improve quality, foster innovation, join up thinking and monitor involvement and impact.
Learning	Provide opportunities for learning and reflection and provide support for continuing professional development and training.
<b>PEOPLE</b>	<b>INVOLVE STAFF, STUDENTS AND REPRESENTATIVES OF THE PUBLIC AND UTILISE THEIR ENERGY, EXPERTISE AND FEEDBACK TO SHAPE THE STRATEGY AND ITS DELIVERY.</b>
Staff	Ensure that all staff – in academic and support roles – have opportunities to get involved in informal and formal ways.
Students	Proactively include and involve students in shaping the mission and in the delivery of the strategy, and maximise opportunities for their involvement.
Public	Invest in people, processes and infrastructure to support and nurture the involvement of individuals and organisations external to the HEI.

## Using the tool

The matrix allows you to consider first of all the level of strategic and practical support your institution offers for public engagement – and then to begin to identify areas where you would like to see change happen.

Elsewhere on our website, in the [Planning for Change section](#), you can find more in-depth resources and guides to help you tackle each of the dimensions, and to draw on the experiences of other institutions who have begun to address them successfully.

## Instructions for use

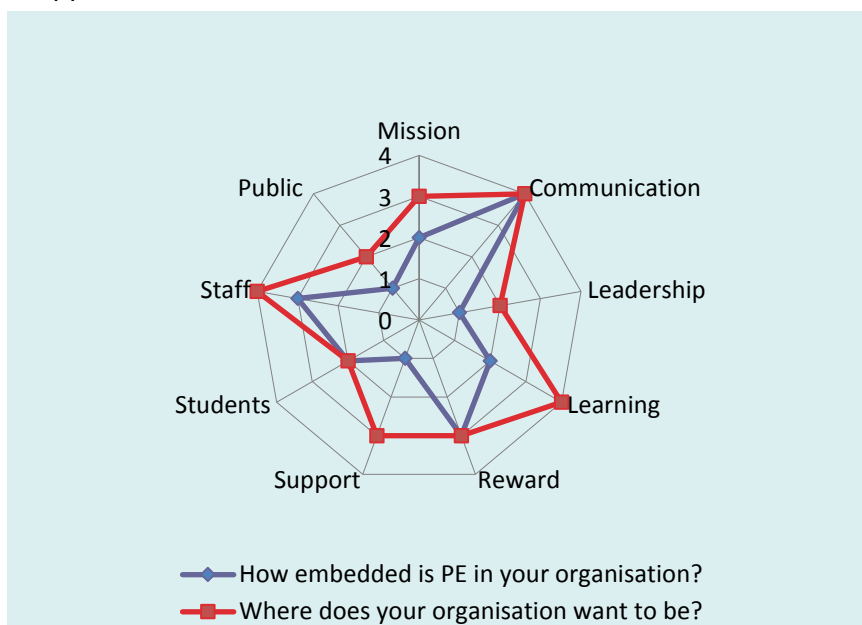
You can use the tool to assess the support for PE at an institutional level – or use it within faculties or departments to explore how engagement is supported there. You can use it in a variety of ways, for example:

- You could fill it in individually, relying on your own knowledge of your institution;
- You could use it as part of a workshop with colleagues and other stakeholders;
- Or you could invite a number of people to fill it in individually and then bring them together to compare their perspectives. Comparing different departments across an institution can be a powerful exercise.

While the levels presented here assume that embedding engagement brings benefits to an institution, some may choose not to seek to ‘embed’ support in all of the areas identified in the tool. In some instances, informal and emergent approaches may be preferred to formalised and embedded ones.

## Interpreting the results

You may find it useful to be able to present your results as a spider diagram, similar to the illustration below – indicating where your organisation currently sits; and where you would ideally like it to move to. This visual representation should help you to identify where you need to invest time and resources, and inform your planning process. You can find instructions for how to create such a diagram in Appendix 2.



## THE EDGE TOOL: SELF-ASSESS YOUR SUPPORT FOR PUBLIC ENGAGEMENT

	FOCUS	EMBRYONIC	DEVELOPING	GRIPPING	EMBEDDING
<b>PURPOSE</b>	<b>Mission</b>	There is little or no reference to public engagement in the organisational mission or in other institution-wide strategies	PE is referenced sporadically within the institutional mission documents and strategies, but is not considered a priority area	PE is clearly referenced within the institutional mission and strategies and the institution is developing an institution-wide strategic approach	PE is prioritised in the institution's official mission and in other key strategies, with success indicators identified. It is a key consideration in strategic developments in the institution
	<b>Leadership</b>	Few (if any) of the most influential leaders in the institution serve as champions for public engagement	Some of the institution's senior team act as informal champions for public engagement	Some of the institution's senior team act as formal champions for public engagement	The VC acts as a champion for PE and a senior leader takes formal responsibility. All senior leaders have an understanding of the importance and value of public engagement to the institution's agenda
	<b>Communication</b>	The institution's commitment to public engagement is rarely if ever featured in internal or external communications	Public engagement occasionally features in internal and external communications	Public engagement frequently features in internal communications, but rarely as a high-profile item or with an emphasis on its strategic importance	PE appears prominently in the institution's internal communications; its strategic importance is highlighted, and resources and strategic support have been allocated to sustain this
<b>PROCESS</b>	<b>Support</b>	There is no attempt to co-ordinate public engagement activity or to network learning and expertise across the institution	There are some informal attempts being made to co-ordinate PE activities, but there is no strategic plan for this work. Some self-forming networks exist, not supported by the institution	Oversight and co-ordination of PE has been formally allocated (e.g. to a working group or committee) but there is minimal support and resource to invest in activity	The institution has a strategic plan to focus its co-ordination, a body/ies with formal responsibility for oversight of this plan, and resources available to assist the embedding of PE. There are a number of recognised and supported networks
	<b>Learning</b>	There is little or no opportunity for staff or students to access professional development to develop their skills & knowledge of PE	There are some opportunities for staff or students to access professional development and training in PE, but no formal or systematic support	There are some formal opportunities for staff or students to access professional development and training in PE.	Staff and students are encouraged and supported in accessing professional development, training and informal learning to develop their skills and knowledge of engagement
	<b>Recognition</b>	Staff are not formally rewarded or recognised for their PE activities	Some departments recognise and reward PE activity on an ad hoc basis.	The university is working towards an institution-wide policy for recognising and rewarding PE activity	The university has reviewed its processes, and developed a policy to ensure PE is rewarded & recognised in formal and informal ways
<b>PEOPLE</b>	<b>Staff</b>	Few if any opportunities exist for staff to get involved in public engagement, either informally or as part of their formal duties	There are opportunities for staff in a handful of faculties or departments to get involved in PE, either informally or as part of their formal duties	There are structured opportunities for many staff members to get involved in PE; but not in all faculties or departments. There is a drive to expand opportunities to all	All staff have the opportunity to get involved in public engagement, either informally or as part of their formal duties, and are encouraged and supported to do so
	<b>Students</b>	Few opportunities exist for students to get involved in PE, either informally, through volunteering programmes, or as part of the formal curriculum	There are opportunities for students to get involved, but there is no coordinated approach to promoting and supporting these opportunities across the institution	Many (but not all) students have the opportunity to get involved in PE and are encouraged and supported to do so. There is a drive to expand opportunities to all	All students have the opportunity to get involved in PE, and are encouraged and supported to do so. The institution offers both formal and informal ways to recognize and reward their involvement
	<b>Public</b>	Little or no attempt has been made to assess community need, or to support 'non-traditional' groups in engaging with the institution	Some attempt has been made to analyse community need and interest; and to begin to tackle access issues to open up the institution and its activities to the public	The institution has committed resources to assessing community need and interests, and to using this insight and feedback to inform its strategy and plans	The institution has assessed need & committed resources to supporting a wide range of groups to access its facilities and activities, and to systematically seek their feedback and involvement.

## What next?

Having used the EDGE tool to assess your overall support for public engagement, it is likely that you will wish to address your current level of support for some, or possibly all, of the nine challenge areas.

To help with this, we have created ‘mini’ EDGE tools for each of the nine challenges, which identify for each one three to five ‘pressure points’ that you can helpfully address to make a positive difference. Included below is the mini tool for Mission, to give you an example of the approach:

MISSION				
FOCUS	EMBRYONIC	DEVELOPING	GRIPPING	EMBEDDING
<b>Embedding in mission</b>	Public engagement is not addressed explicitly in the institutional mission or in departmental / institution-wide strategies.	PE is referenced sporadically within the institutional mission documents and strategies, but is not considered a priority area.	Work is underway to review the institution’s commitment to PE, in order to articulate a set of strategic priorities and embed these in the institutional mission and other relevant strategies.	Public engagement is prioritised in the institution's official mission and in other key departmental / institution-wide strategies, with success indicators identified.
<b>Shared understanding of public engagement and its value</b>	The term is used inconsistently and infrequently and very few staff have an understanding or appreciation of what it means or its relevance to their work.	References to public engagement appear in some institutional strategies and plans, but there is no institution-wide definition for public engagement.	Consultation is underway with internal and external stakeholders to share understandings of public engagement and its purpose, and to develop a shared definition.	The institution has consulted widely with internal and external stakeholders to develop a definition for PE and its purpose and value which is used consistently.
<b>Strategic planning</b>	There is no official strategic plan for advancing PE.	Although some short- and long-term goals for PE have been defined, these have not been formalized into an official strategic plan that will guide their implementation.	Work is underway to develop an official strategic plan for PE.	The institution has developed an official strategic plan for advancing PE, which includes viable short-term and long-term goals. A senior individual / team has formal responsibility for monitoring progress.
<b>Alignment with other priorities</b>	Public engagement rarely features as a component within wider institutional initiatives.	Public engagement occasionally features within wider institutional initiatives, but in a relatively piecemeal way.	Processes are being developed to ensure that PE is routinely considered during strategic planning.	Public engagement is routinely considered during strategic planning and institution-wide developments.

## Planning for change

These resources can all be found in the ‘Planning for Change’ area of our website:

- [www.publicengagement.ac.uk/support/planning-change](http://www.publicengagement.ac.uk/support/planning-change)

Each of the nine challenge areas has its own dedicated section, containing its own self-assessment tool, and an introduction and/or guide to how each of the key 'pressure points' can be addressed. This guidance builds on their experiences of the Beacons and other universities, and includes a host of practical tips, case studies, and other useful resources which you can draw on in your own institution.

## Your feedback

We would very much welcome your feedback on the EDGE tool, and your suggestions for how it might be improved. Please contact us at [ncccpe.enquiries@uwe.ac.uk](mailto:ncccpe.enquiries@uwe.ac.uk)

## APPENDIX ONE: OUR SOURCES

There are many examples of similar tools, which we have drawn on for inspiration, for instance this toolkit and set of standards for people working in the youth sector:

- *Hear by Right*

To create the tool, we have reviewed a range of Higher Education sources, as well as seeking to incorporate feedback from the beacons, other HEIs and from UWE and the University of Bristol. One key source was a matrix produced in the USA by Professor Barbara Holland:

- *Analyzing Institutional Commitment to Service: A Model of Key Organizational Factors*

Another was developed by Professor Andrew Furco at the University of California, Berkeley to support the institutionalization of service learning:

- *Self-Assessment Rubric for the Institutionalization of Service Learning in Higher Education*

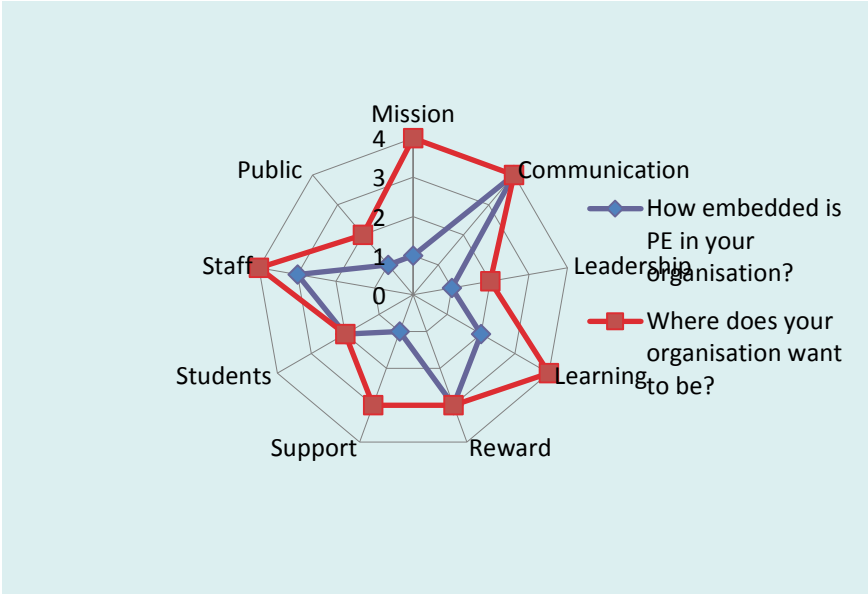


## APPENDIX TWO: CREATING A SPIDER DIAGRAM

This Spider diagram will require you to have installed Microsoft Word and Excel (or other compatible software)

1. Complete the self-assessment exercise
2. Once you have determined where you currently 'fit' on each focal point, you should decide where on the scale you would like your organisation to move to in the future. You may want to move the organisation further on, or you may be content with your current position.
3. Convert both scores into numerical values:
  - Embryonic: 1
  - Developing: 2
  - Gripping: 3
  - Embedding: 4
4. Using a mouse right click on the spider diagram below. Select 'Edit Data'
5. This will open an excel sheet. Input the numerical values into the relevant fields
6. When you have finished inputting both the current and aspirational values close the excel sheet
7. Your diagram should now have been updated to reflect your situation
8. Areas where the red and blue lines diverge are sections where there is a gap between your aspiration and your current activity. These areas are worth exploring further using the online resources.
9. Save the document using a different file name. You may wish to re-do the exercise at a later point to review your progress.

Example data used to produce sample plot		
	How embedded is PE in your organisation?	Where does your organisation want to be?
Mission	1	4
Communication	4	4
Leadership	1	2
Learning	2	4
Reward	3	3
Support	1	3
Students	2	2
Staff	3	4
Public	1	2



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